

## CASE STUDY

# Global Bank Secures Microsoft 365 and Rolls Out Copilot with Confidence

*Federally Regulated Financial Organization*



A large, federally regulated financial institution with more than 5,000 employees and global operations was under mounting pressure to modernize its security stack while also preparing for the rollout of Microsoft Copilot. Like many organizations, the firm had invested heavily in Microsoft 365 but soon discovered that Microsoft's native security and compliance tools, while valuable, had critical blind spots. The tools were strong within the Microsoft ecosystem itself but struggled to account for business context that resided across non-Microsoft systems such as CRM, IAM, and other enterprise applications. This lack of cross-platform visibility created an overwhelming volume of false positives and noise. Security teams found themselves chasing unreliable alerts and wasting time, which eroded trust in the tools and introduced greater risk.

## Challenge

The organization was also under pressure to deploy Microsoft Copilot as part of its enterprise-wide push toward AI-driven productivity. The challenge, however, was ensuring that this deployment didn't inadvertently expose sensitive financial data residing in SharePoint and other Microsoft repositories. Microsoft Copilot would only succeed if security and compliance guardrails were in place from day one, an area where the organization struggled to feel confident given its legacy stack.

Insider risk presented yet another urgent challenge. As a global financial institution subject to turnover and contractor exposure, the firm needed real-time visibility into data usage across a wide range of internal and external entities. Traditional DLP solutions were blind to this kind of fluid risk because they relied on static rules and lacked the ability to correlate entity activity across business contexts. Given the sensitivity of financial operations, continuing with legacy tools alone was untenable.

Adding to the pressure, federal regulators had imposed strict requirements for data security and reporting. The firm needed to demonstrate compliance through enterprise-wide dashboards, detailed reporting, and precise metrics that mapped directly to federal mandates. Existing tools were simply not capable of producing this level of visibility, leaving the organization exposed ahead of its looming audit.

## Solution

The team was put in touch with Bonfy.AI for its focus on AI-related content risks and work in the Microsoft space. Built to address exactly the kind of contextual gaps this firm faced, Bonfy integrated deeply within the Microsoft suite while simultaneously pulling intelligence from external enterprise systems. This multi-contextual approach allowed the firm to move beyond surface-level detections and cut through the noise that was crippling its team, dramatically reducing false positives and delivering accurate, actionable insights. Security teams no longer had to chase unreliable alerts but were able to focus their attention on real incidents that mattered.

When it came to Microsoft Copilot, Bonfy Adaptive Content Security™ (ACS) AI-native platform provided highly reliable labeling and governance for sensitive content in SharePoint and other Microsoft data repositories. These labels served as the necessary guardrails that allowed the Microsoft Copilot rollout to move forward securely and on time. What could have introduced unacceptable risk instead became a productivity initiative launched with confidence.

For entity risk management, Bonfy's real-time analysis looked not only at static identities but also at the relationships and behaviors surrounding data access. By correlating identity data from IAM systems with contextual business activity, Bonfy enabled the security team to understand when and how an entity's actions posed risk. This fine-grained, context-aware perspective allowed the company to drastically reduce insider risk incidents, something legacy tools simply could not offer.

Finally, Bonfy equipped the firm with a powerful compliance framework. Its out-of-the-box dashboards and customizable policies provided a holistic view of data risk across channels, systems, and geographies. When federal auditors arrived, the institution was able to demonstrate full compliance with data security and protection requirements, passing the audit with ease. What had once been a looming operational risk became a moment of validation for the firm's leadership and security team.

# Results

The results were transformative for the business. False positives dropped, insider risk-related data loss decreased, and the security team gained actionable insights. The firm was also able to achieve its strategic goals, launching Microsoft Copilot on schedule, safely and compliantly while protecting sensitive financial data and meeting federal compliance requirements.

## Summary of benefits:

- 70% reduction in false positives, restoring confidence in detection and response workflows.
- Actionable insights that enabled security teams to fix vulnerabilities at the source rather than chasing noise.
- Granular explainability into risk drivers, making investigations faster and more transparent.
- Secure, on-time Microsoft Copilot rollout, positioned as a competitive advantage for improving productivity.
- Significant decrease in insider-driven risk, protecting sensitive financial data across global operations.
- Passed federal data security audits with ease, aligning with stringent regulatory requirements and setting the firm apart as a trusted, compliant financial institution.

With Bonfy, the organization moved from reactive firefighting to proactive, confident data security, and compliance across its global operations.

## About Bonfy

Bonfy ACS is a next-gen DLP platform for the AI era, using contextual intelligence, behavioral analytics, and adaptive remediation to protect sensitive data while enabling secure AI adoption. With deep Microsoft 365 and Copilot integration, it powers safe collaboration, high accuracy, out-of-the-box policies, and fewer false positives—lowering costs and accelerating value.

Trusted by regulated organizations, Bonfy reduces risk, ensures compliance, and enables confident GenAI adoption.